January 2, 2008

RE: Steven Herrera v. Central Washington University (CWU)
        Allocation Review No. ALLO-07-037

Dear Mr. Herrera:

The Director's review of CWU's allocation determination of your position has been completed. The review was based on written documentation.

Background
At the request of your supervisor, CWU's Human Resources Office conducted a review of your position. By memorandum dated April 5, 2007, CWU determined that your Information Technology Specialist 2 (ITS2) position was properly allocated.

On May 3, 2007, you filed a request for a Director's review. You asked that your position be reallocated to the Information Technology Specialist 3 (ITS3) classification.

By notice dated October 26, 2007, Karen Wilcox, Director's Review Coordinator, informed the parties that the review would be considered through written documentation. Ms. Wilcox set an exhibit deadline of December 14, 2007 for the submission of additional documentation. Neither party submitted additional information.

Summary of Mr. Herrera's Perspective
You assert that you provide support for the Human Resource module which is quite large and that the work you do on a daily basis has a scope and impact that goes beyond the module. You contend that you support a diverse group of users with unique needs and different levels of expertise. You argue that your work assures that employee data is received timely, accurately and safely, which enables employees to be paid correctly. You further argue that you perform journey-level work such as setting up data tables and creating testing scenarios to assure system changes are correct. You contend that your work impacts the entire university and that you work with and provide support to Human Resources, Academic Affairs, Student Employment, Timekeepers, Payroll, Accounting, Budget and Institutional Research in the use of the Human Resource module. You believe that the ITS3 level best describes your duties and responsibilities.

Summary of CWU's reasoning
CWU determined that you provide standard support and follow established procedures in providing system support to users, resolving problems through data analysis and system knowledge, and running reports. CWU asserts that you maintain system tables, analyze functionality and make recommendations for use, support major upgrades, approve requests for user access and train users. CWU contends that your work is limited in scope and impacts individuals or small groups that use the Human Resource module of PeopleSoft. CWU asserts that the ITS2 continues to provide the best match for your position.

Director's Determination
As the Director's designee, I carefully reviewed all of the documentation in the file including the duties and responsibilities described in the January 2007 Position Description Form for your position. Based on my review of the documents, the available classifications, and my analysis of your assigned duties and responsibilities, I conclude that your position is best described by the ITS2 classification.

Rationale for Determination
The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See <u>Liddle-Stamper v. Washington State University</u>, PAB Case No. 3722-A2 (1994).

You provide primary support to multiple users of the Human Resource module of the PeopleSoft application. In addition, you provide support to vendors who interface with the system and you coordinate and set up data file transmittals, encryptions of files, queries, and access to the system. You analyze computing problems, find solutions and write procedures. As indicated in your Position Description Form, you spend 40% of your time performing system support; 20% on system updates and changes; 15% on system security issues, and 15% on procedures and training.

The Category Concept for the Information Technology Specialist Occupational Category states:

> Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.

> This category broadly describes positions in one or more information technology disciplines such as: Application Development And Maintenance, Application Testing, Capacity Planning, Business Analysis and/or Process Re-Engineering, Data Base Design And Maintenance, Data Communications, Disaster Recovery/Data Security, Distributed Systems/LAN/WAN/PC, Hardware Management And Support, Network Operations, Production Control, Quality

Assurance, IT Project Management, Systems Software, Web Development, or Voice Communications.

Positions which perform information technology-related work to accomplish tasks but are non-technical in nature would not be included in this occupational category.

This is a broadly written category which encompasses a wide variety of positions that perform professional information technology systems and/or applications functions. Your position fits within the category concept because you perform primary system support for end users and vendors and perform system updates and changes for the Human Resource module of the PeopleSoft application. In addition, you assure security for user access, maintain knowledge of policies and procedures, recommend changes to procedures to ensure data integrity, train end users, and maintain the HRIS manual.

The distinguishing characteristics for the ITS3 classification state:

In support of information systems and users in an assigned area of responsibility, independently performs consulting, designing, programming, installation, maintenance, quality assurance, troubleshooting and/or technical support for applications, hardware and software products, databases, database management systems, support products, network infrastructure equipment, or telecommunications infrastructure, software or hardware.

Uses established work procedures and innovative approaches to complete assignments and coordinate projects such as conducting needs assessments; leading projects; creating installation plans; analyzing and correcting network malfunctions; serving as system administrator; monitoring or enhancing operating environments; or supporting, maintaining and enhancing existing applications.

The majority of assignments and projects are moderate in size and impact an agency division or large workgroup or single business function; or internal or satellite operations, multiple users, or more than one group. Consults with higher-level technical staff to resolve complex problems.

You support the Human Resource module of the PeopleSoft application and its users and perform the type of work described in the first paragraph of the distinguishing characteristics. In addition, you use established work procedures. Based on the information in your Position Description Form, you do not coordinate projects, lead projects, create installation plans, analyze or correct network malfunctions or serve as a system administrator. You do support, monitor and enhance a portion of the existing PeopleSoft application. However, the majority of your work is limited to the Human Resource module. While the overall results of the end users' use of the application impacts individuals across the entire university, your work is limited in scope to support of the end users themselves in the use of a portion of the PeopleSoft application. Your position does not have the scope or impact envisioned by the ITS3 classification.

The distinguishing characteristics for the ITS2 classification state:

In support of information systems and users, performs standard consulting, analyzing, programming, maintenance, installation and/or technical support.

Under general supervision, follows established work methods and procedures to complete tasks on computers and/or telecommunication software/hardware, applications, support products, projects, or databases for small scale systems or programs or pieces of larger systems or programs. Performs standard tasks such as consulting with customers to identify and analyze technology needs and problems; responding to and resolving trouble reports from users; processing equipment and service orders; coordinating installations, moves, and changes; analyzing problems for parts of applications and solving problems with some assistance; supporting and enhancing existing applications in compliance with specifications and standards; conducting unit, system or usability testing; writing specifications and developing reports; developing and conducting application, software and/or system operation training for users; or serving as part of a problem solving team addressing more complex issues. The majority of tasks are limited in scope and impact individuals or small groups. Complex problems are referred to a higher level.

Glossary of classification terms found in the Department of Personnel Classification and Pay Administrative Guide defines general supervision as:

Recurring assignments are carried out within established guidelines without specific instruction. Deviation from normal policies, procedures, and work methods requires supervisory approval, and supervisory guidance is provided in new or unusual situations. The employees work is periodically reviewed to verify compliance with policies and procedures.

You carry out your duties and responsibilities using established guidelines. As indicated in your Position Description Form, you consult with the Human Resource Information System Administrator on security requests that are outside of standards. You perform work in support of a piece of the larger Human Resource Information System and the PeopleSoft application. You perform standard tasks such as consulting with customers to identify and analyze problems; responding to and resolving trouble reports from users; supporting and enhancing the existing application in compliance with specifications and standards; writing procedures; and conducting training for users.

The position description serves the same purpose as the former classification questionnaire. Both the Personnel Appeals Board and the Personnel Resources Board have held that because a current and accurate description of a position's duties and responsibilities is documented in an approved classification questionnaire, the classification questionnaire becomes the basis for allocation of a position. An allocation determination must be based on the overall duties and responsibilities as documented in the classification questionnaire. Lawrence v. Dept of Social and Health Services, PAB No. ALLO-99-0027 (2000).

Your overall duties and level of responsibility and the scope of your assignments as described in your Position Description Form are best described by the ITS2 classification. Your position is properly allocated.

Appeal Rights
WAC 357-49-018 provides that either party may appeal the results of the Director's review to the Personnel Resources Board by filing written exceptions to the Directors' determination in accordance with Chapter 357-52 WAC.

WAC 357-52-015 states that an appeal must be received in writing at the office of the Board within thirty (30) calendar days after service of the Directors' determination. The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Sincerely,

Holly Platz, SPHR
Director's Review Investigator

cc: Traci Klein, CWU
        Lisa Skriletz, DOP